Cloudera Data Visualization 7.2.9

Users and User Groups

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CLOUDERA

Legal Notice

Contents

Creating new user accounts

The following steps demonstrate how to create a new user account.

Before you begin
You must have administrative privileges to perform this action.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.
2. Click Users & Groups.
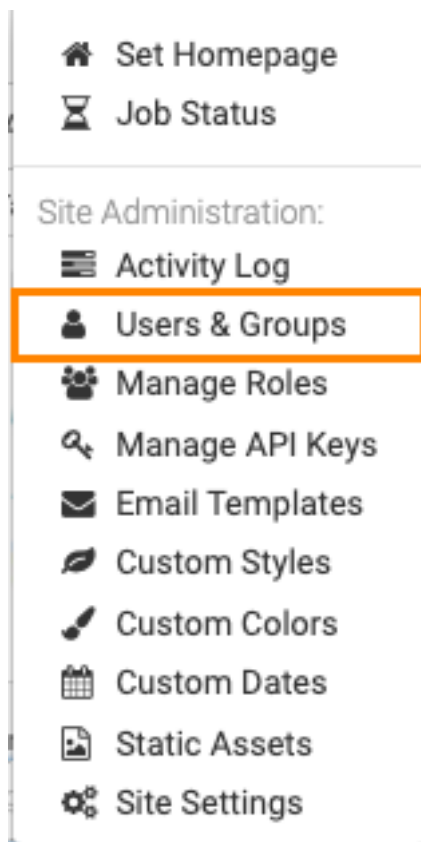
The Manage Users & Groups interface appears, open on the Users tab.

3. Click NEW USER.
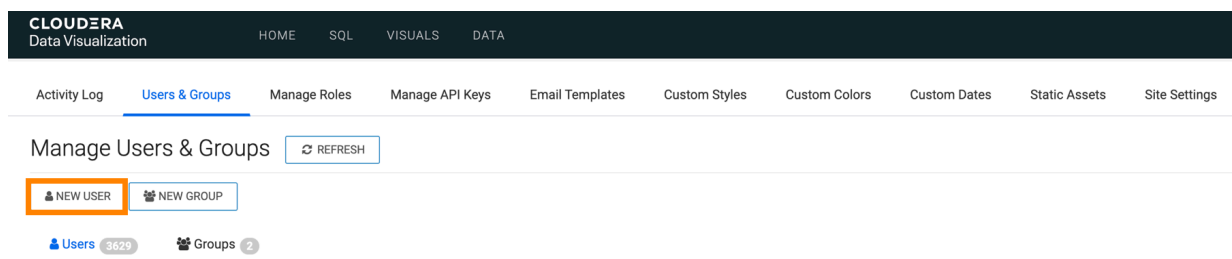
The New User modal window appears.

4. Fill in the new user details:

- Name & password

  - Username
  - First Name and Last Name

    You can also pick these values from LDAP user definitions.

  - Password

    ⚠️ **Important:** When you enter your password, ensure that the password meets the minimum security requirements specified for Cloudera Data Visualization.

    For more information, see *Setting user password requirements*.

    After five failed login attempts, Cloudera Data Visualization locks out the user. For instructions on how to change the account lockout configuration settings or to unlock the user, see *Configuring account lockout*. You can check the Show Password option to display the password.

- Permissions

  - Normal user and Admin user

    Select Normal user.

  - [Optional] On the Groups tab, under Group Membership, you can use the Search box to find user groups, and assign the new user to existing groups by selecting user groups on the left list, and then clicking Add

to move them to the right. For more information on how to add users to groups see, *Creating new user groups*.

- [Optional] On the Roles tab, under Roles, you can use the Search box to find roles, and assign the new user to existing roles by selecting roles on the left list, and then clicking Add to move them to the right. For more information on users and roles, see *Assigning roles to users*.

Note: If you have not defined at least one User Group, the New User modal window does not contain Group Membership information.

New User ✕

Username *

> enter username

First Name

> enter first name

Last Name

> enter last name

Password *

> enter password

Permissions

🔘 **Normal user** - can access Cloudera Data Visualization site
⭕ **Admin user** - have all permissions to site

Groups   **Roles**

Roles

> Search   🔍

Available to select
☐ **Select All**
_____
☐ Administrators Only
☐ Analyst
☐ bug
☐ Database admin
☐ Dataset 1
☐ Dataset 2
☐ END

ADD >>

<<

Selected

Select options from the left

CANCEL   SAVE

5. Click SAVE.

Results

After the operation succeeds, you can see the Manage Users & Groups page, showing the Users tab with the new user's information.

When a user logs in, their first name and last name appear in the top right corner of the navigation bar.

After a new user logs in, notice that the date joined changes and the last login changes from Never to a few seconds ago.

Related Information
Setting user password requirements
Configuring account lockout
Creating new user groups
Assigning roles to users

Editing accounts

You can change the profile of any user or administrator account in Cloudera Data Visualization.

Before you begin
You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to change the username and permissions for a Cloudera Data Visualization user account. The process is the same for changing the administrative account.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.

2. Click Users & Groups.
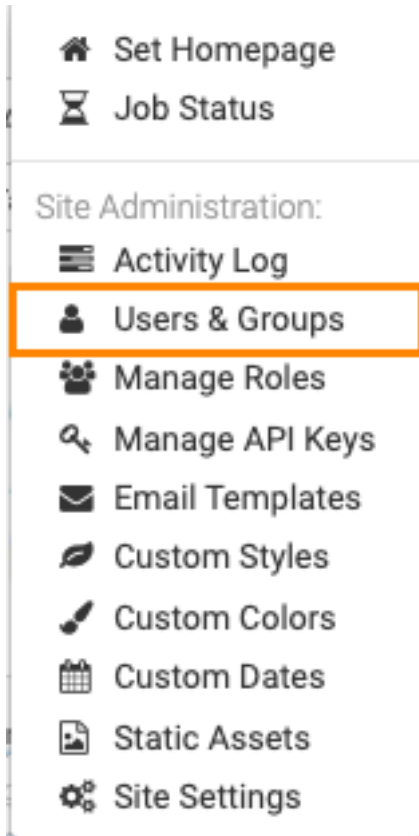
The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of registered users, do one of the following:

- Click the Username of the user that you want to edit.
- Click the Pencil icon next to the account that you want to edit.

The Edit User modal window appears.

4. You can change the following details:

- Name & password

  - Username
  - First Name and Last Name
  - Password

- Permissions

  - Normal user and Admin user
  - Group Membership
  - Roles

- Active or Inactive

Edit User ✕

Username

Anvesh.Koripella

First Name

Anvesh

Last Name

Koripella

Change password

Permissions

🔘 **Normal user** - can access Cloudera Data Visualization site
⭘ **Admin user** - have all permissions to site

Groups   **Roles**

Roles

Search 🔍

Available to select		Selected
☐ **Select All**	ADD >>	Select options from the left
☐ Analyst	<<	
☐ bug		
☐ Database admin		
☐ Dataset 1		
☐ Dataset 2		
☐ nur_can't_manage_connections		

🔘 Active   ⭘ Inactive

Date joined: a year ago
Last login: Never

CANCEL   DELETE USER   SAVE

5. Click SAVE.

Results

After the operation succeeds, you can see the Manage Users & Groups page, showing the Users tab with the updated information.

Changing user passwords

An administrator may reset the password of any user or of another administrator in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

About this task

Note: The 'change password' option is not available for LDAP and SAML user accounts.

The following steps demonstrate how to change the password for any Cloudera Data Visualization user account.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.

2. Click Users & Groups.
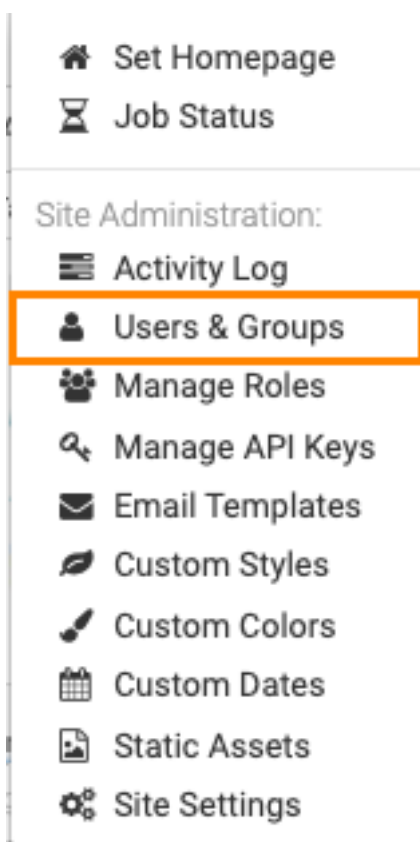
The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of registered users, do one of the following:

- Click the Username of the account you want to change.
- Click the Pencil/Edit icon that corresponds to the account you want to change.

The Edit User modal window appears.

4. In the Edit User modal window, click Change password.

Edit User   ✕

Username

TestUser

First Name   **Last Name**

John   Doe

Change Password

Permissions

⦿ **Normal user** - can access Cloudera Data Visualization site

○ **Admin user** - have all permissions to site

| Groups | Roles |

Group Membership

Search   🔍

Available to select   ADD >>   Selected

                                   <<   ☐ **Select All**

                                                  ☐ viz_guest_group

New group name   **+ ADD**

⦿ **Active**   ○ **Inactive**

Date joined: 18 hours ago
Last login: 18 hours ago

5. Enter the new password.

Consider the following when choosing the password:

- Ensure that the password meets the minimum security requirements specified for the Cloudera Data Visualization instance. For more information, see *Setting user password requirements*.
- After five failed login attempts, Cloudera Data Visualization locks out the user. For instructions on how to change the account lockout configuration settings or to unlock the user, see *Configuring account lockout*.

You can check the password you have added if you check the Show Password option.

Hide password

New Password *

enter new password

6. Click SAVE.

Results

The user's password is changed and you get back to the Manage Users & Groups interface.

Related Information

Setting user password requirements

Configuring account lockout

Promoting a user to administrator

You can promote any user to an administrator in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

Procedure

1. To promote the user to administrator, open the user account in Edit mode and change the Permissions by selecting Admin user.

2. To demote an administrator to plain user, select Normal User under Permissions.

Creating new administrator accounts

An administrator can create new administrator accounts in Cloudera Data Visualization.

Before you begin

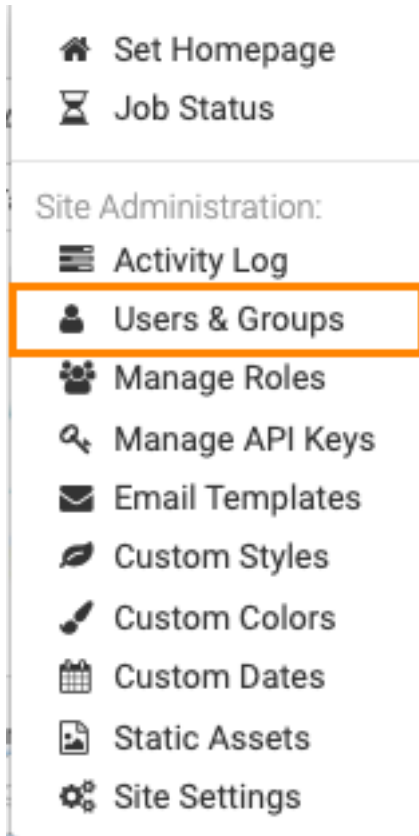You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to create a new admin account.
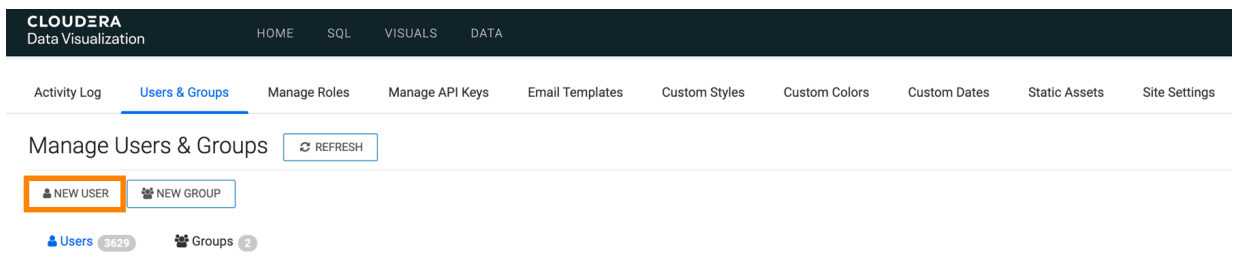
Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.

2. Click Users & Groups.

The Manage Users & Groups interface appears, open on the Users tab.

3. Click NEW USER.

The New User modal window appears.

4. Fill in the new admin details:

- Name & password

  - Username
  - First Name and Last Name

    You can also pick these values from LDAP user definitions.

  - Password

    ⚠ **Important:** When you enter your password, ensure that the password meets the minimum security requirements specified for Cloudera Data Visualization.

    For more information, see *Setting user password requirements*.

    After five failed login attempts, Cloudera Data Visualization locks out the user. For instructions on how to change the account lockout configuration settings or to unlock the user, see *Configuring account lockout*. You can check the Show Password option to display the password.

- Permissions

  - Normal user and Admin user

    Select Admin user.

  - [Optional] On the Groups tab, under Group Membership, you can use the Search box to find user groups, and assign the new user to existing groups by selecting user groups on the left list, and then clicking Add

to move them to the right. For more information on how to add users to groups see, *Creating new user groups*.

- [Optional] On the Roles tab, under Roles, you can use the Search box to find roles, and assign the new user to existing roles by selecting roles on the left list, and then clicking Add to move them to the right. For more information on users and roles, see *Assigning roles to users*.

Note: If you have not defined at least one User Group, the New User modal window does not contain Group Membership information.

New User   ✕

Username *

enter username

First Name   **Last Name**

enter first name   enter last name

Password *

enter password   👁⃠

Permissions

🔘 **Normal user** - can access Cloudera Data Visualization site
⚪ **Admin user** - have all permissions to site

Groups   **Roles**

Roles

Search   🔍

Available to select		Selected
☐ **Select All**	ADD >>	Select options from the left
☐ Administrators Only	<<	
☐ Analyst		
☐ bug		
☐ Database admin		
☐ Dataset 1		
☐ Dataset 2		
☐ END		

CANCEL   SAVE

Results

After the operation succeeds, you can see the Manage Users & Groups page, showing the Users tab with the new admin user's information.

Related Information

Setting user password requirements

Creating new user groups

Inactivating user accounts

If it is necessary, you can inactivate a user's account without removing it from the system in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to inactivate a Cloudera Data Visualization user account.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.
2. Click Users & Groups.

   The Manage Users & Groups interface appears, open on the Users tab.
3. In the list of Users, click either the Username of the account you want to inactivate, or the Edit (Pencil) icon.
4. In the Edit User modal window, select Inactive.
5. Click SAVE.
6.

Results

After the operation succeeds, you can see the Users list on the screen. The inactiveated user is part of the list, and the status shown is set to inactive.

Assigning roles to users

You can assign roles to users in Cloudera Data Visualization.

Note: This feature is only available to users with *Manage roles and users* privileges.

An administrator can assign users to roles in several ways:

Assigning roles to a single user

You ocan add security roles to a user's profile in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.
2. Click Users & Groups.
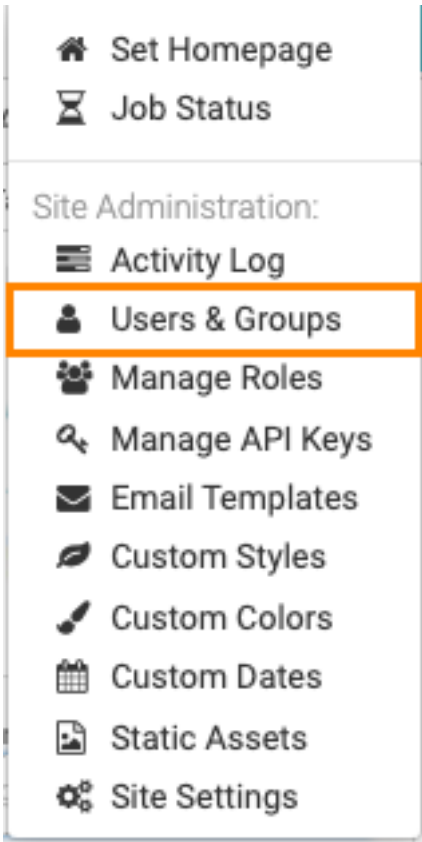
The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of registered users, select the user for which you plan to assign new roles, and click the edit (Pencil) icon that corresponds to that account.

   Alternatively, you can click the Username of the account that you want to change.
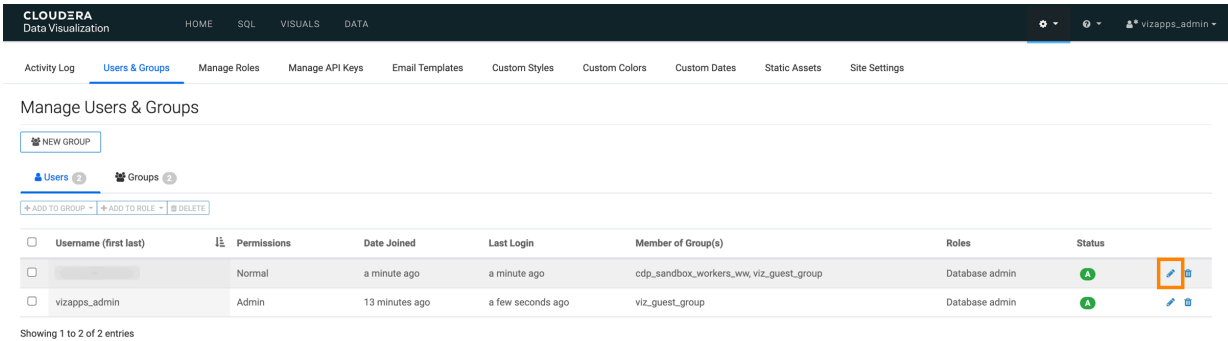
The Edit User modal window appears.

4. Click the Roles tab.

5. Select a new role to assign to the user and click ADD.

6. After the desired role or roles appear on the right side of the interface, click SAVE.

Results

In the Users & Groups interface, the user now has the new role assignment.

Assigning roles to multiple users

You can add several users to a role at the same time in Cloudera Data Visualization.

Before you begin
You must have administrative privileges to perform this action.

### About this task

To assign users to existing roles, follow these steps:

Procedure

1. Under the Members tab, in the Users list, click Edit User(s)
2. The Role Assignment modal window for users appears.

3. There are several options for adding a user to a membership:

- *Search*

  If you have a long list of users in the Members section, use the Search box to match user names, select them from the sub-list, then click ADD to move them to the right side of the modal window, and finally click APPLY.
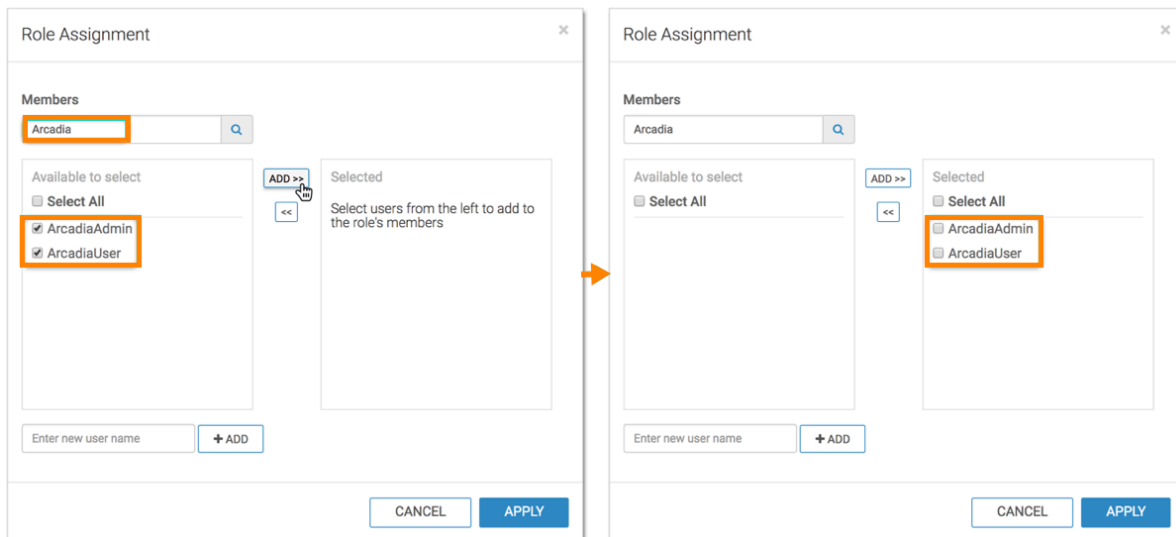
- *Select*

  In the Members section, select the users to assign to the role, click ADD to move them to the right side of the modal window, and finally click APPLY.
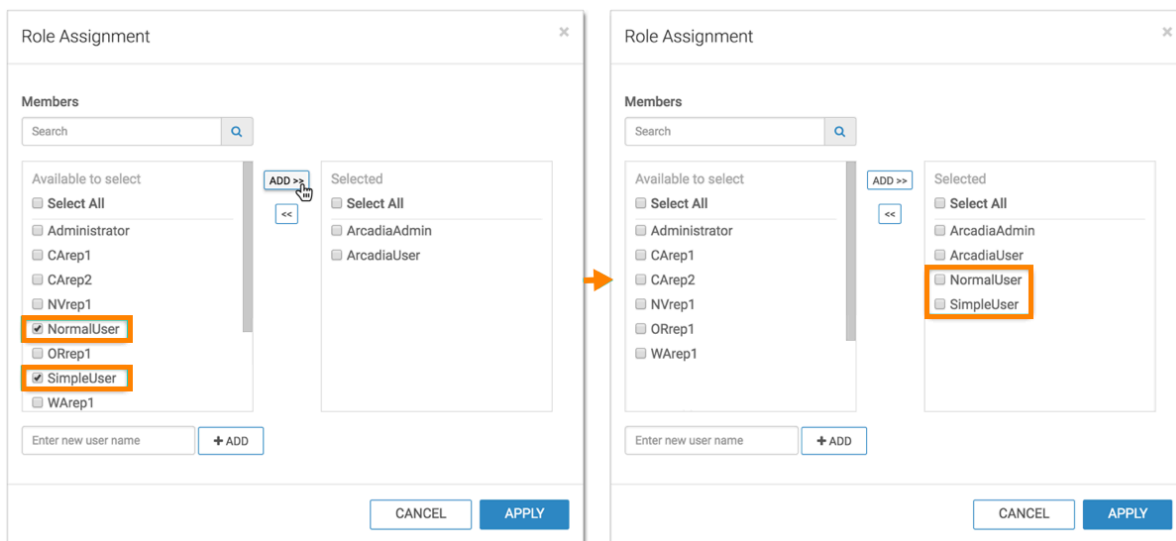
- *Select All*

  To assign all users to Members, select All to get all user names, then click ADD to move them to the right side of the modal window, and finally click APPLY.
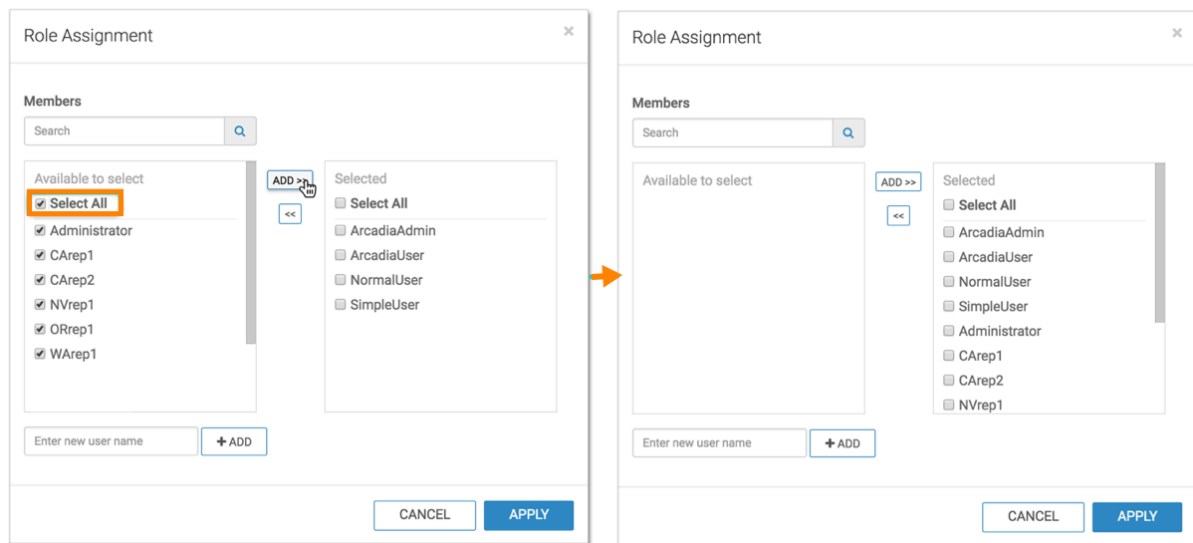
- *Adding Externally Defined Users; LDAP Authentication*

    For convenience, the Role Assignment interface supports adding into the list of assignees usernames that are not stored locally. For example, known usernames available through LDAP authentication may be added in this manner.

    Enter the new user name, and click ADD. After the new user name appears in the Members section, select it and click ADD to move the new user to the right side of the modal window. Click APPLY.
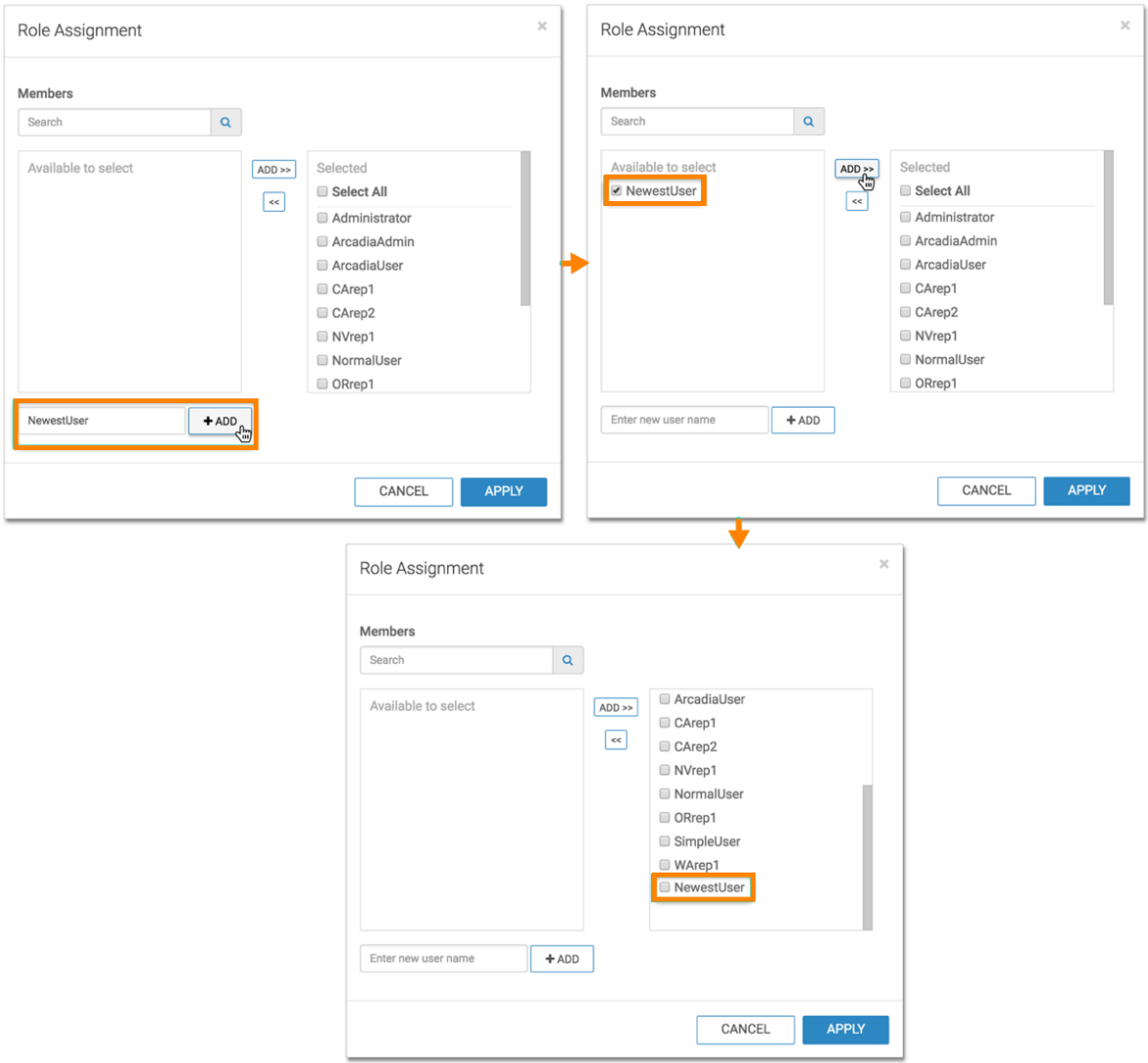
- *Remove*

  To move users out of Members, select the user(s) on the right side panel, then click the Left Arrow, and finally click APPLY.
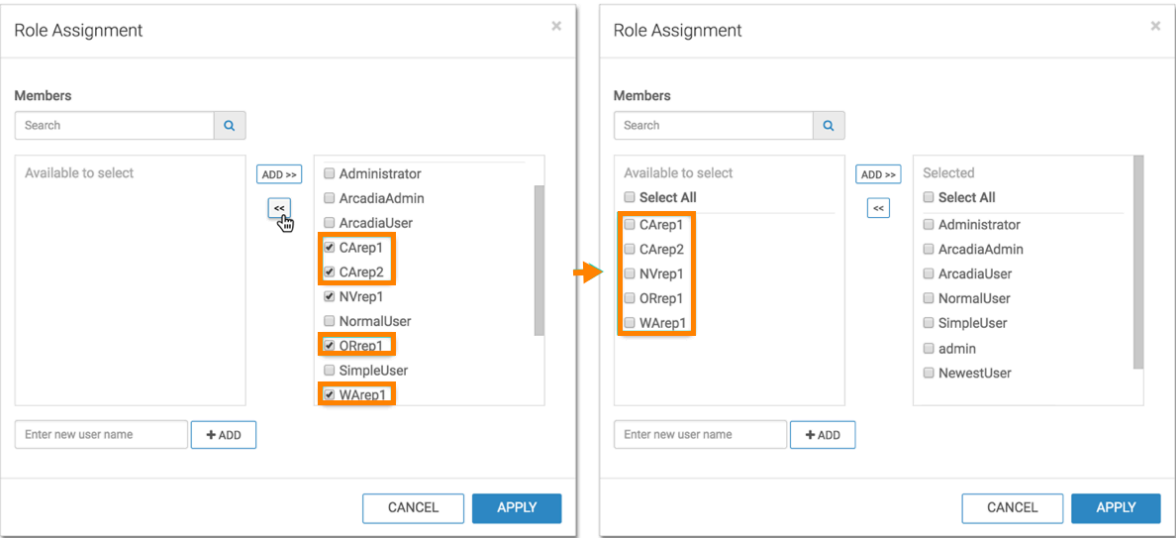
The list of users assigned to the role appears in the Role: Test Role 1 interface, under the Members tab.

4. Click SAVE. A confirmation of role update appears briefly on the screen.

Assigning multiple roles to multiple users

You can add multiple users to multiple role at the same time in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

About this task

To assign multiple users to existing roles, follow these steps:

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.

2. Click Users & Groups.
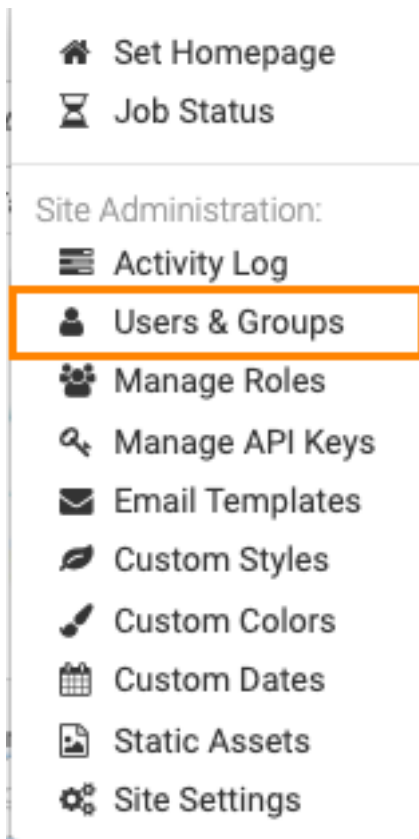
The Manage Users & Groups interface appears, open on the Users tab.

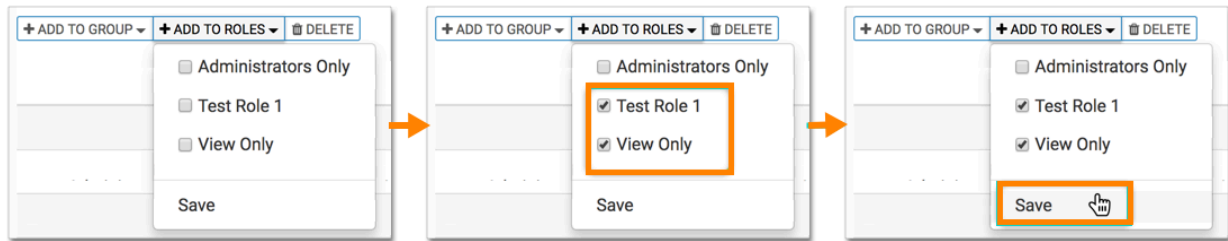3. Select the users that you want to assign to roles. In this example the following users are used: CArep1, CArep2, NVrep1, ORrep1, and WArep1.

4. Click ADD TO ROLES.

5. In the drop-down menu, select the roles you plan to assign to the selected users, and click SAVE.

In this example, Test Role 1 and View Only are used.

Results

Note the changes to the information in the Users interface.

Deleting user accounts

You can delete both standard user accounts, and administrator accounts in Cloudera Data Visualization.

Note: This feature is only available to users with administrative privileges.

An administrator can delete user accounts in the following ways:

Deleting individual user accounts

You can delete user accounts in Cloudera Data Visualization.

Before you begin
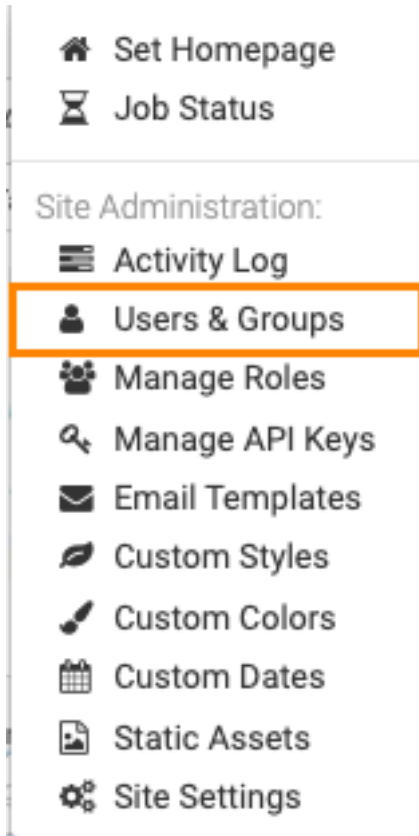You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to delete an individual Cloudera Data Visualization user account.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.

2. Click Users & Groups.

The Manage Users & Groups interface appears, open on the Users tab.

3. In the list of users, do one of the following:

- Find the username of the account you want to delete, and click the Trashcan icon.

- Click the Username of the account you want to delete, or the edit (Pencil) icon.

The Edit User modal window is displayed.

4. Click DELETE USER.

5. In the confirmation modal window, click DELETE.

Results

After the operation succeeds, you will see the Users screen. The Username of the account you just deleted is no longer on the list.

Deleting several user accounts

You can delete user accounts in Cloudera Data Visualization.
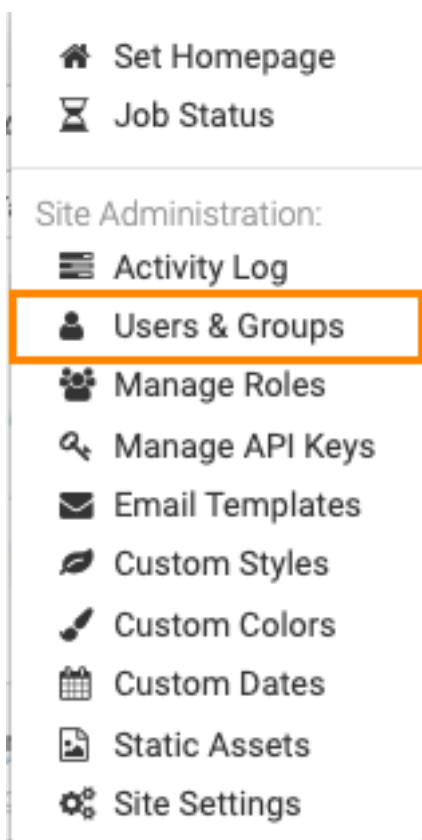
Before you begin
You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to delete several Cloudera Data Visualization user accounts at the same time.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.
2. Click Users & Groups.

The Manage Users & Groups interface appears, open on the Users tab.
3. In the list of users, click the checkmarks next to the usernames you plan to delete.

4. Click DELET.

5. In the confirmation modal window, click DELETE.

Creating new user groups

You can create new user groups in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to create a new user group.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.

2. Click Users & Groups.
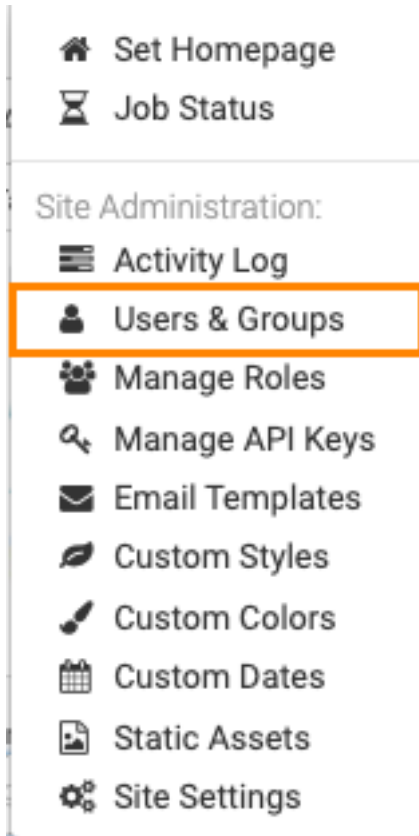
The Manage Users & Groups interface appears, open on the Users tab.

3. Click New Group.
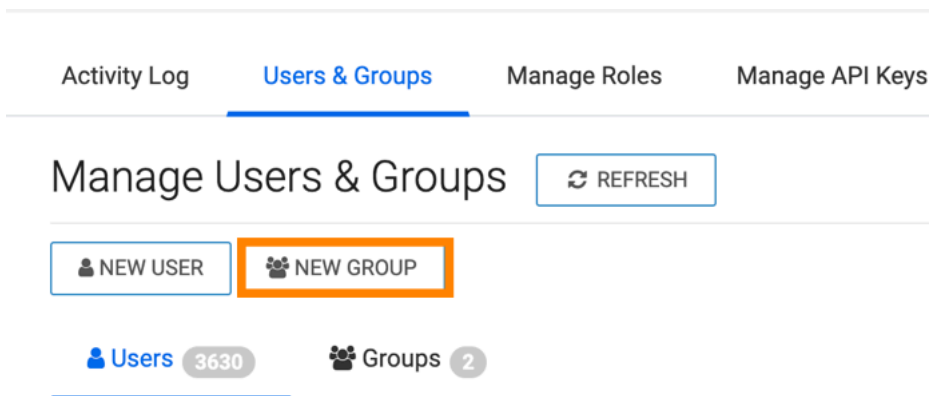
The New Group modal window appears.

4. In the New Group modal window:

- Enter Group Name.
- [Optional] Under Members on the Users tab, use the Search box to find users, and assign the new user to existing groups by selecting user groups on the left list, and then clicking ADD to move them to the right.

5. Click SAVE.

Results

After the operation succeeds, you can check the Users interface and find that the group assignment applies to the users just assigned to the new group.

Editing user groups

You can edit the user groups in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

About this task

When editing a user group, you can change its name, and the users assigned to it.

The following steps demonstrate how to edit user groups.

Procedure

1. Click the Gear icon on the main navigation bar to open the Administration menu.
2. Click Users & Groups.
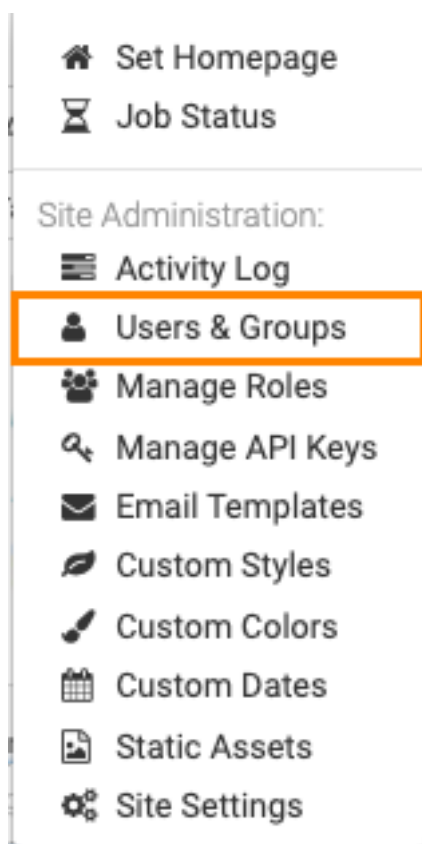
   The Manage Users & Groups interface appears, open on the Users tab.
3. Click the Groups tab.
4. In the list of user groups, click the name of the user group to edit, or the Pencil icon on that row.
5. The Edit Group modal window appears.

6. To change the name of the user group, simply change the text in the Group name field, and click Save.

Edit Group   ✕

Group name

viz_guest_group

Users   Roles

Members

Search   🔍

Partial users are shown; please use the search box to search the full list of users.

☐ abaker (Adham Bani Baker)   ADD >>   Selected

☐ abalasubramanian (Aswin   <<   Select options from the left
Shakil Balasubramanian)

☐ abanerjee (Arijit Banerjee)

☐ abarr (Anthony Barr)

☐ abarrette (Aaron Barrette)

☐ abartfeld (Alexander
Bartfeld)

☐ abatham (Anurag Batham)

☐ abathla (Ashish Bathla)

CANCEL   DELETE GROUP   SAVE

Adding users to user groups

You can add users to groups in Cloudera Data Visualization.

Note: This feature is only available to users with administrative privileges.

Administrators can add users to groups in several ways:

Adding a user to multiple groups; user modal

There are several options for adding a user to user groups when working in the New Group or Edit Group modal window.

Procedure

Choose from the below options:

- If you have a long list of groups in the Group Membership section, use the Search box to match group names, select groups from the sub-list, and then click ADD to move them to the right side of the modal window. Click SAVE.
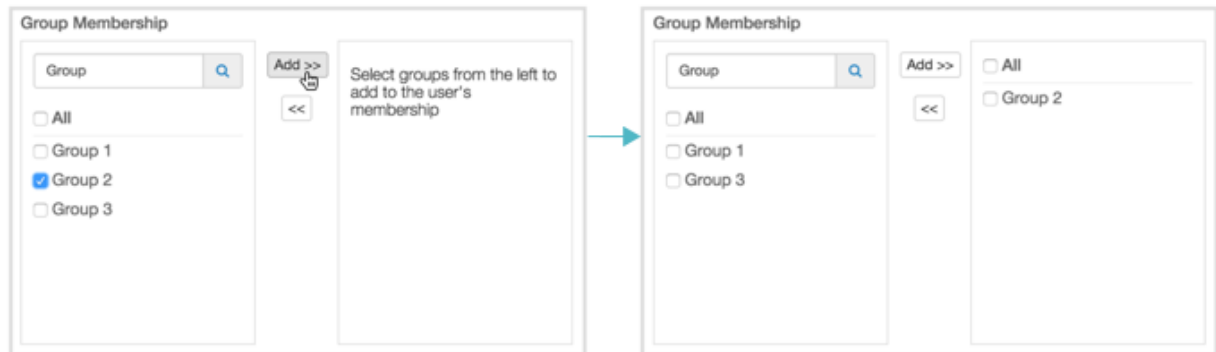
- In the Group Membership section, select the group to assign to the user and click ADD to move them to the right side of the modal window. Click SAVE.

- To assign the user to all user groups, select All to get all the groups, and then click ADD to move them to the right side of the modal window. Click SAVE.

- To move the user out of one or more groups, select the groups on the right side panel, and then click the Left Arrow. Click SAVE.

Adding multiple users to a single group; group modal

There are several options for adding users into a specific user group when working in the New Group or Edit Group modal window.

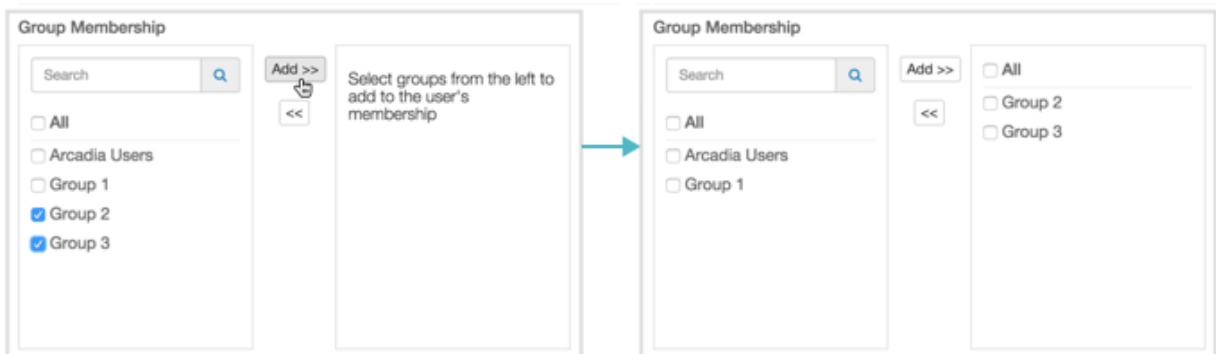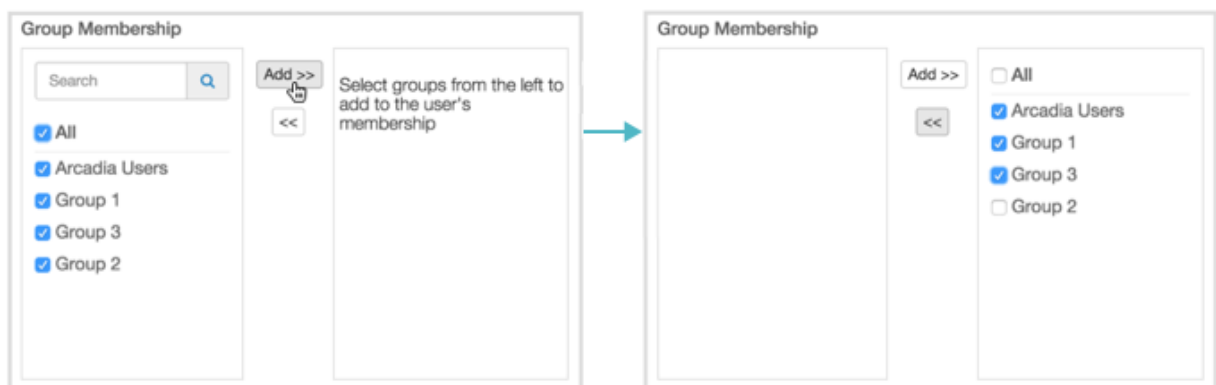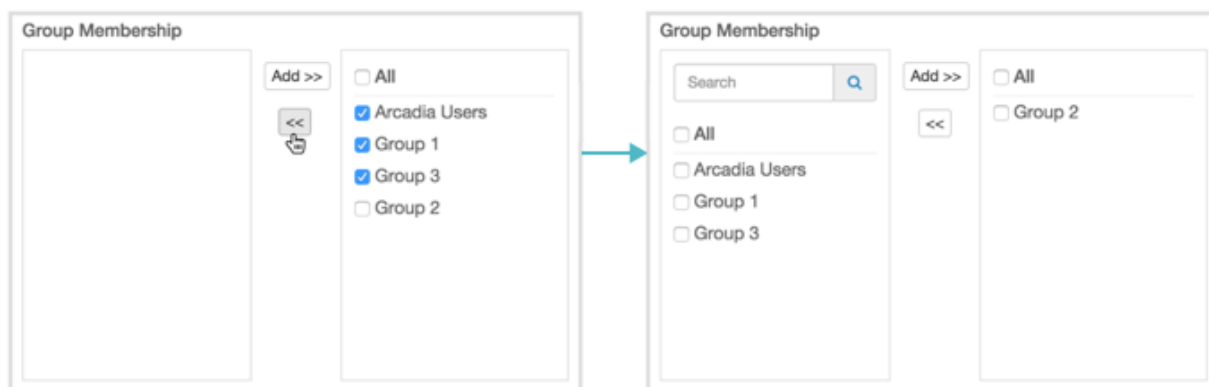### Procedure

Choose from the below options:

- If you have a long list of users in the Members section, use the Search box to match usernames, select users from the sub-list, and then click ADD to move them to the right side of the modal window. Click SAVE.
- In the Members section, select the users to assign to the group and click ADD to move them to the right side of the modal window. Click SAVE.

- To add all users to a particular group, select All, and then click ADD. Click SAVE.
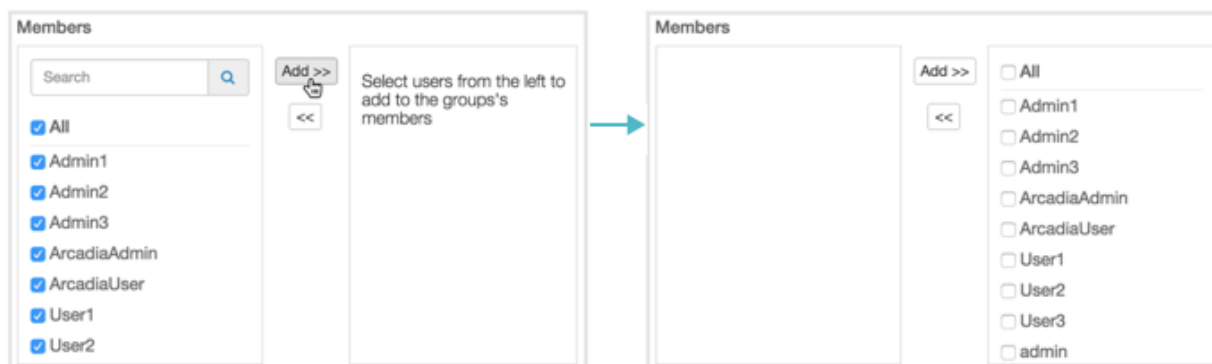
- To move users out of the group, select the users on the right side panel, and then click the Left Arrow. Click SAVE.
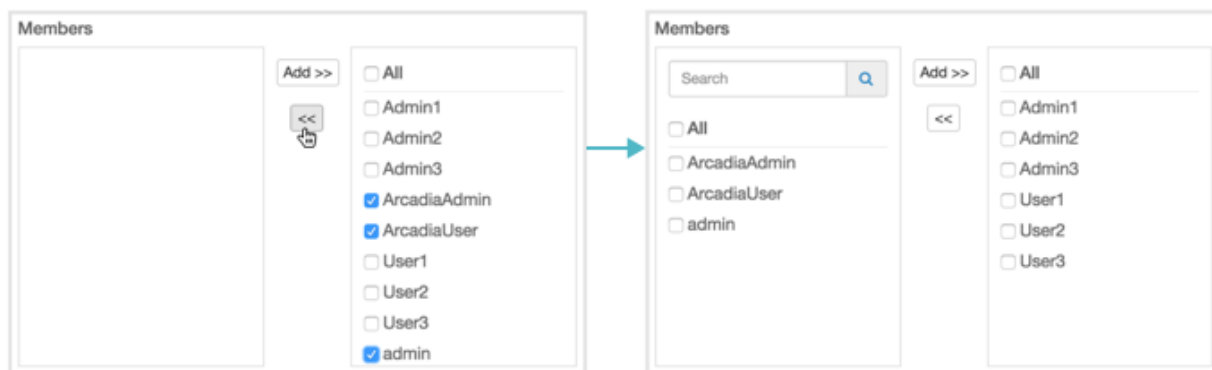
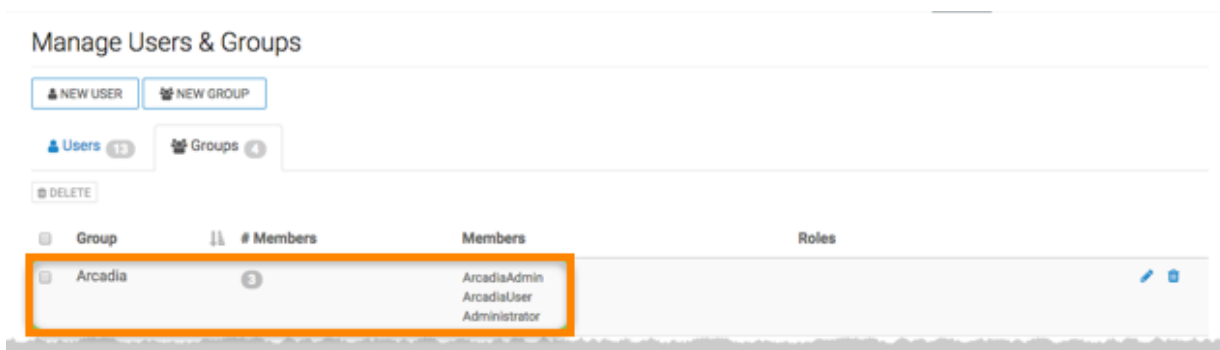## Adding multiple users to multiple groups; users tab

When working in the Users tab, you can add multiple users to one or more user groups.

Procedure

1. Select the users that you want to assign to groups.
2. Click the Down Arrow on the right of Add to Group, and select the groups for the users.
3. Click SAVE.

Assigning roles to user groups

About this task

The following steps demonstrate how to add user groups to a role.

Procedure

1. Navigate to the Members tab of the Role Detail interface.

   The Require all groups option ensures that only members of ALL groups listed in the role membership fields have the role's defined access. It determines whether members must belong to all listed groups or any one of them to access the role's privileges.

   Note:

   - If Require all groups is checked, only users belonging to both groups will receive the role's privileges.
   - Exceptions to group membership include explicitly named users and users imported through Ranger groups.

2. Click EDIT GROUP(S).
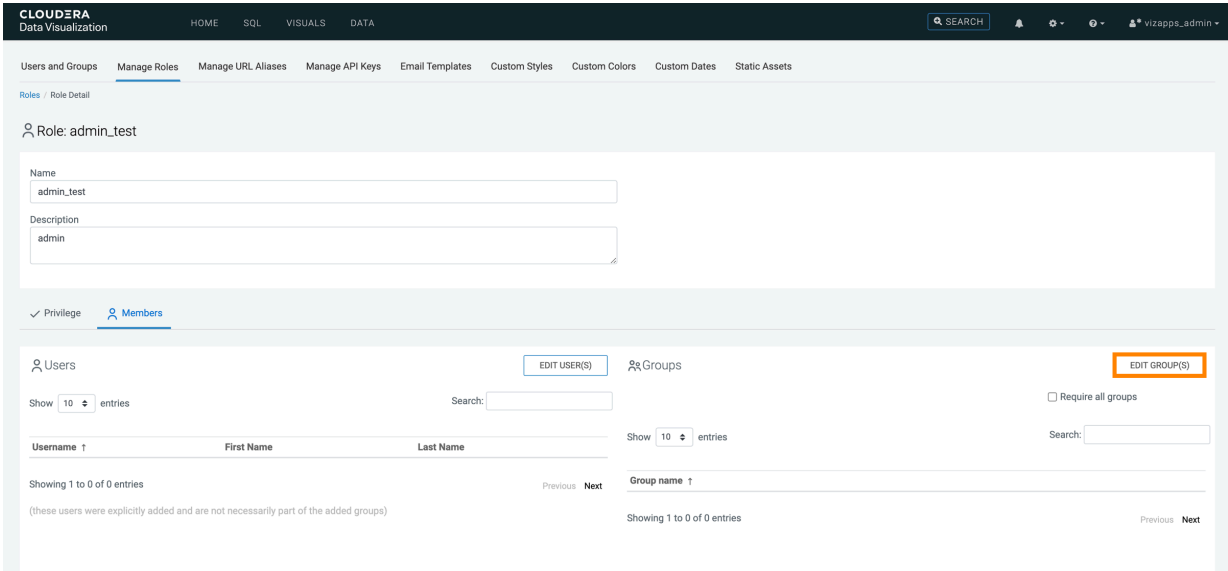
The Role Assignment modal window is displayed.

**3.** There are several options to add groups to role membership:
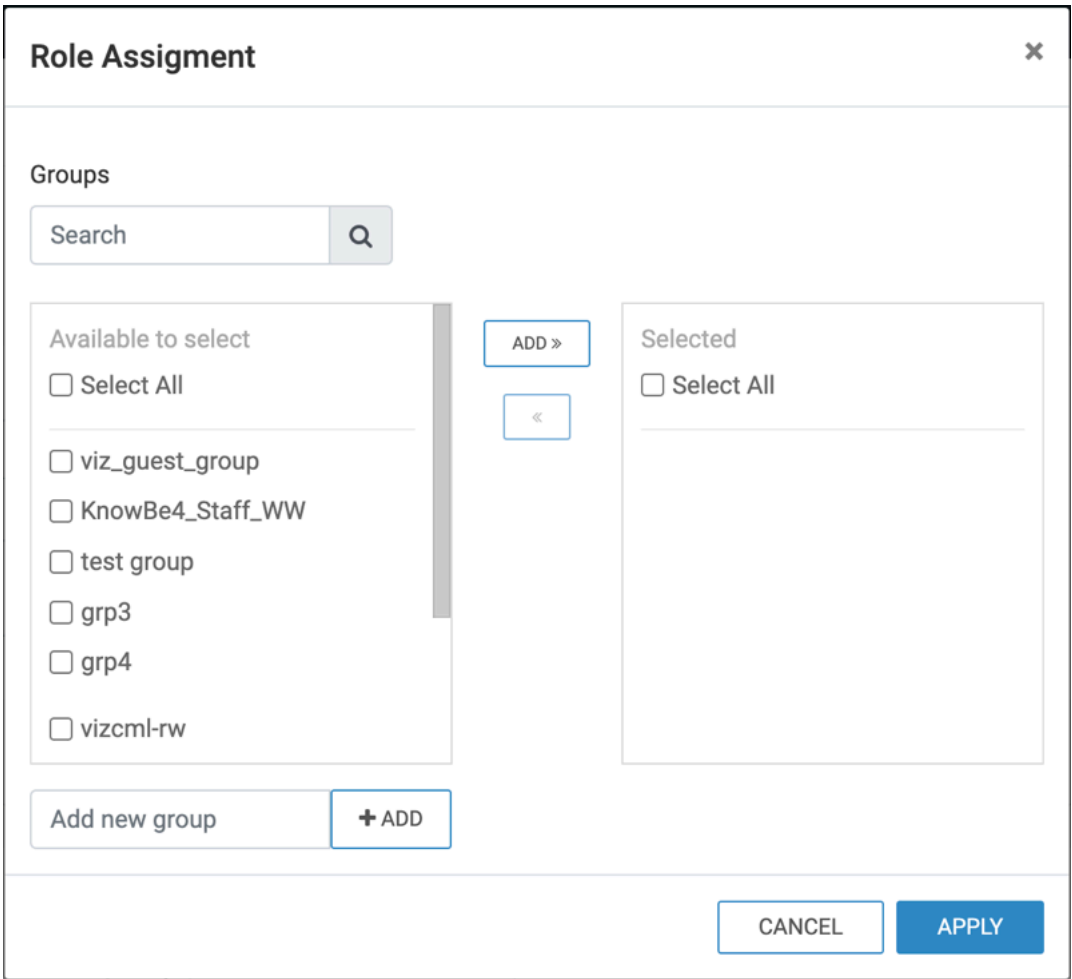
- Search

  If you have a long list of groups in the Groups section, use the Search box to find specific group names, select them from the sub-list, and click ADD>> to move them to the right side of the modal window.

  When you are ready, click APPLY.

- Select

  In the Groups section, select the groups to assign to the role and click ADD>> to move them to the right side of the modal window.

  When you are ready, click APPLY.

- Select All

  To assign all groups to Groups, mark Select All and click ADD>> to move them to the right side of the modal window.

  When you are ready, click APPLY.

- Adding externally defined users (LDAP authentication)

  The Role Assignment modal supports adding user groups to the list of assignees that are not stored locally. For example, you can add known groups available through LDAP authentication using this method.

  Enter the new group name and click ADD>>. After the new group name appears in the Members section, select it and click ADD>> to move the new group to the right side of the modal window.

  When you are ready, click APPLY.

- Remove

  To remove users from the Members list, select them on the right side panel and click <<.

  When you are ready, click APPLY.

4. Click APPLY CHANGES.

The Users list is updated.

Deleting user groups

You can delete user groups in Cloudera Data Visualization.

Before you begin

You must have administrative privileges to perform this action.

About this task

The following steps demonstrate how to delete a previously defined user group.

Procedure

1. Click the Groups tab.

2. There are several ways for deleting user groups:

Method 1:

    a. Click the boxes next to the names of the user groups to select them.

    b. Click DELETE.

    c. In the confirmation window modal, click DELETE.

Method 2:

    a. Click on the select box next to the table header Group.

    This Selects all user groups.

b. Click Delete.

c. In the confirmation window modal, click Delete.

Method 3:

a. Click the name of the user group.

> Alternatively, click the Pencil icon.

b. In the Edit Group window modal, click DELETE GROUP.

c. In the confirmation window modal, click DELETE.

Edit Group   ✕

Group name

Test 1

Users   Roles

Members

Search   🔍

Available to select	ADD >>	Selected
☐ **Select All**	<<	☐ **Select All**
☐ ifeher		☐ doctestuser (Ildiko vizapps_admin)
☐ szhou		☐ vizapps_admin

CANCEL   DELETE GROUP   SAVE

Method 4:

a. Click the Trash can icon that corresponds to the user group.

b. In the confirmation window modal, click DELETE.